



Using GiftMaker Pro and Microsoft Word to Generate Donation Thank You Letters (PC)

Overview

This document provides Windows users with instructions for using GiftMaker Pro and Microsoft Word (version 6, 97 or 2000) to generate donation thank you letters. Follow the steps in each procedure below to see how to:

Setting up Thank You Letters

- ✦ **Procedure I** – Create an export file for use in creating thank you letter bodies.
- ✦ **Procedure II** – Create **thank you letter bodies** in Word. These documents are important, because they contain your thank you message. You can create as many thank you letter bodies as you need, and tailor them for different classes of donors or for different campaigns.
- ✦ **Procedure III** – Add thank you letter bodies to GiftMaker Pro's Thank You Letter Table.
- ✦ **Procedure IV** – Create your donation **thank you shell letter** in Word. This document (provided) is the keystone of the Word mail merge process. It contains all of the merge coding the process depends on for selecting a thank you letter body and drawing in names and addresses from the GiftMaker Pro export file.

Merging Thank You Letters

- ✦ **Procedure V** – Enter donations in GiftMaker Pro and tie each one to a particular thank you letter body.
- ✦ **Procedure VI** – Create a **donation thank you export file** in GiftMaker Pro. The export file contains the data that the mail merge process uses to produce your thank you letters.
- ✦ **Procedure VII** – Perform a mail merge in Word. You'll see how to use your Word documents and the donation thank you export file to produce the thank you letters you print out and send to donors.
- ✦ **Procedure VIII** – Clear donation records in GiftMaker Pro (important).

The task of creating thank you letter bodies and integrating them with GiftMaker Pro (Procedures I – IV) is something you might only do occasionally, depending on how your letter needs change. However the task of entering gifts and producing thank you letters (Procedures V – VIII) is something you will do frequently, so you might refer to these instructions more often.

I. Create an Export File for Use in Creating Thank You Letter Bodies

Before you create a new thank you letter body, you must generate an export file using a dummy donation. The export file tells your word processor which GiftMaker Pro fields are available to insert in the letter. Follow these steps to create the export file:

- 1 In Master Maintenance & Inquiry, enter a donation on any record. There is no need to enter a Thanks Document at this time, but be sure to check the **Send Thank You** box.

*NOTE: If you are working in your live database and not the tutorial data file, enter the dummy donation in a familiar record (such as your own). After you're done with the export file, go back into the **Donation History** window of the record, select the gift, and **Delete** it.*
- 2 **Save** the donation.
- 3 Close the Master Record Information window.
- 4 Click the **Donation Thank Yous** button in GiftMaker Pro's Main Menu.
- 5 Select **Export File** under **Output Formats** in the Donation Thank Yous window.
- 6 Click the **Export Parameters** button.
- 7 In the Export File Parameters window, leave the **Export File Name** as **DTYData** and select the following options:
 - File Format equals **Tab Delimited**
 - Date Format should be the long form (e.g. **April 1, 2000**)
 - **Export complete name and address**
 - **Export code fields as Description**
- 8 Click **OK/Enter**.
- 9 Click **Process/Enter** in the Donation Thank Yous window.

After you complete step 9, GiftMaker Pro generates an export file, named **DTYData.DOC**, and places it in the same folder as your GiftMaker Pro application (typically, the GiftMaker Pro folder within the Campagne program folder).

II. Create Thank You Letter Bodies

GiftMaker Pro comes with a variety of thank you letter bodies, ready for use in the mail merge process. You'll find these Word documents in the **WordMerg** folder in the Campagne directory on your hard drive.

The following steps show you how to use the Thanksml document to create a thank you letter body. Instructions for adding *merge fields* are included (Steps 6a - 6l). Merge fields pull data from your donation export file and insert it into your letters, enabling you to tailor your thank you message to each donor.

- 1 Open Word by clicking the **To Word Processing** button in the Donation Thank You window.
 - If Word does not open, the path to your word processing program is not set up properly. To set the path, select **File > User Preferences > User Preferences Window**, and then open the **Processing** pane. Enter the correct path by doing a **Lookup** in the Word Processing **Path Name** field. Find Word and double-click on it. This should insert the correct path automatically (see GiftMaker Pro Reference Manual: Processing preferences - changes).

- As an alternative to clicking on the **To Word Processing** button in GiftMaker Pro, you can launch Word the way you normally would (from your hard drive, from a desktop shortcut, alias, etc.).

2 Select **File > Open**.

3 Locate the **WordMerg** folder (typically found within the Campagne folder on your hard drive) and double-click to open it.

4 Double-click on the Thanksml document to open it.

The text of Campagne's Thanksml thank you letter body. Note the merge fields Amount, Date, and Fund.

Thank you for your donation of \$«Amount» on «Date». We appreciate every gift. Your donation will be credited to the «Fund» fund.

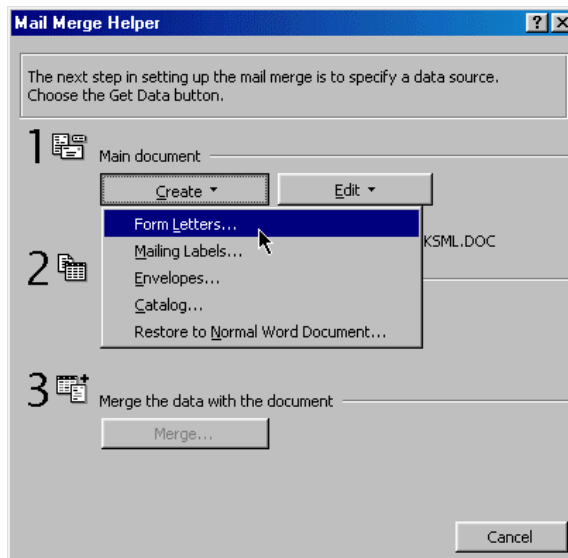
5 Edit the text Campagne provides in the document. Type the text of the body, or copy and paste the body text from an existing document. (Don't worry about the name, address, salutation or closing, because we'll set those up later.)

Go to Step #6 if you want to learn how to add merge fields to the letter body. Go to Step #7 if you do not wish to add additional merge fields.

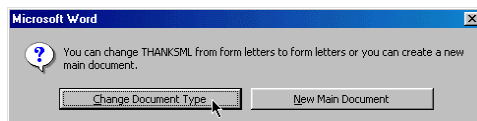
6 **Steps 6a through 6l are necessary only if you wish to insert merge fields in the document.**

To add merge fields to your new letter, you must first designate it as a merge form document, and then insert the merge fields you want.

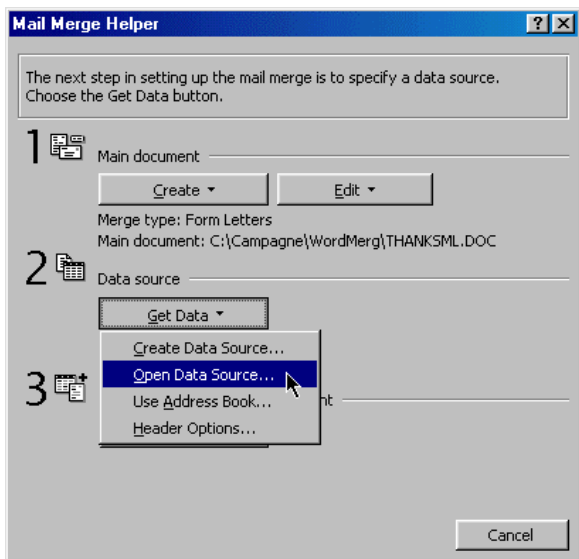
- Select **Tools > Mail Merge**.
- In the Mail Merge Helper window, select **Create > Form Letters** under Main document.



- Click **Change Document Type** when you receive this message.



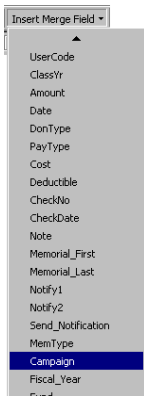
- d. Under Data source, select **Get Data > Open Data Source**.



- e. In the **Open Data Source** window, locate the **DTYData** export file you created in Procedure I and double-click on it (the file should be located in the GiftMaker Pro folder within the Campagne directory). If you do not see the file, check the **List Files of Type** at the bottom of the window and change it to **All Files**.
- f. Click **Close** in the Mail Merge Helper window. Word displays the Mail Merge toolbar, including **Insert Merge Field** and **Insert Word Field**.



- g. Position your cursor wherever you want to add a merge field in the text of the your thank you letter. Then click the **Insert Merge Field** button and select the desired merge field from the long drop down list of available GiftMaker Pro fields. (Refer to the reference manual's Export File Definitions chapter, which describes all of the merge fields available for insertion.)



The text of Thanksml with the Campaign merge field inserted

Thank you for your donation of \$«Amount» on «Date». We appreciate every gift. Your donation will be credited to the «Fund» fund.

Thank you for contributing to our «Campaign» campaign.

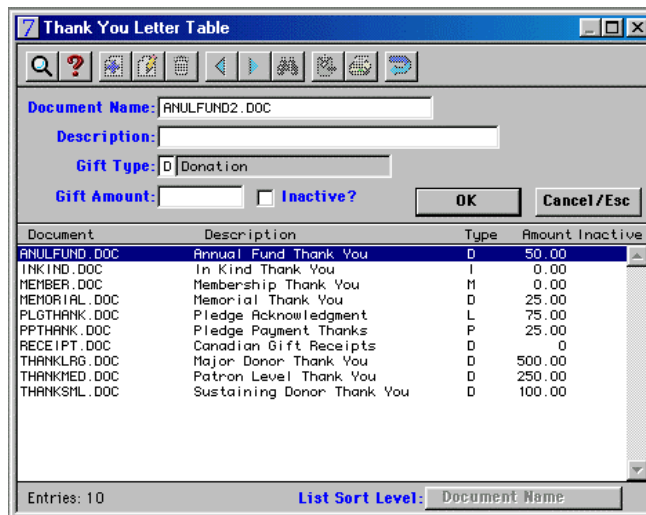
NOTE: Don't forget to format text around the merge field. You may need to add spaces or characters (such as a dollar sign to compliment the Amount field).

- h. Repeat Step 6g to for each GiftMaker pro merge field that you want to appear in your letter body.
 - i. Select **Tools > Mail Merge**.
 - j. Click **Create** and select **Restore to Normal Word Document**.
 - k. Click **Yes** at the next message box.
 - l. Close the Mail Merge Helper window.
- 7** Click **Save As** and save the letter under a new name to create a brand new letter body, or simply save the document under the same name to update it with your changes. **Make certain that you save it in your WordMerg folder!**
- 8** Repeat this process for each thank you letter body you want to create or update.

III. Add Thank You Letter Bodies to the Thank You Letter Table

Before you can use any new letter bodies you have created, you need to add them to the GiftMaker Pro Thank You Letter Table. This makes them available when you are processing gifts and determining which thank you letter to issue the donor.

- 1** Open GiftMaker Pro (make sure that you are attached to your data file).
- 2** Select **Data > Table Maintenance > Thank You Letter Table/Report**.
- 3** Click the **Add** button in the **Thank You Letter Table** window.
- 4** Click once in the **Document Name** field, then use the **Lookup** button to find one of the thank you letters you created in Procedure II. (You should be able to find the letters in the WordMerg folder within the Campagne program folder.)
- 5** Double-click the letter and GiftMaker Pro inserts its name in the **Document Name** field of the **Thank You Letter Table** window.



- 6** Enter a description for the letter in the **Description** field, and assign an appropriate **Gift Type** by using the **Lookup** function in that field.
- 7** Save the document to the table by clicking on the **OK** button.
- 8** Repeat steps 3-7 for each new thank you letter body. Click on the **Cancel/Esc** button when you have finished adding new letters to the Thank You Letter table.

IV. Create Your Donation Thank You Shell Letter

To generate thank you letters in the merge process, you begin with the donation thank you shell letter, provided with GiftMaker Pro. This document is specially encoded to merge the proper name(s) and salutation(s) from your export file with the thank you letter bodies you assigned during gift processing. To verify that the shell letter is set up properly and to add your own salutation, etc., follow these steps:

- 1 Open Microsoft Word.
- 2 Select **File> Open**.
- 3 Locate the **WordMerg** folder (typically found in the Campagne folder) and open it.
- 4 Double-click the **Dtymerge** document (GiftMaker Pro's sample donation thank you shell letter) to open it.
- 5 If you see a dialog box with a message stating that the document "... is a mail merge main document. Word cannot find its data source...", then take these steps:
 - a. Click on the **Find Data Source** button to open the **Open Data Source** window
 - b. Locate the Donation Thank You export file located in the GiftMaker Pro folder and double-click it to open it. The path to this file is typically **C: / Campagne/ GiftMaker Pro/ DTYData**.

***Note:** If you do not see the export file, check the List Files of Type at the bottom of the window and change it to All Files.*

- 6 You need to view the path in the shell letter. To do so, the field codes option must be turned on in Word.

To turn on field codes in Word 6, select **Tools > Options**, click on the **field codes** check box under the **View** tab, and then click **OK**. In Word 97 or 2000, select **Tools > Preferences**, click on the **field codes** check box under the **View** tab, and then click **OK**.

***NOTE:** The shell merge document contains many conditional statements in the date, address, and salutation to merge in the correct person as well as other variables. Do not modify this information.*

With field codes turned on, look in the shell document for the code which includes the text **Mergefield Document** and **Includetext**. It should be located near the end of the document, just above the closing salutation.

This section of code includes a file path to the WordMerg folder. The path tells Word where to find the letter bodies you've assigned to each gift in GiftMaker Pro. The pathname must be correct in order for the merge process to work correctly. The path is set by default to look in the Campagne folder on your hard drive for the WordMerg folder. If the actual path is different (e.g. if your hard drive is named something else, or if the WordMerg folder has been moved), then you must modify it by following these steps:

- 1 Click once on the paragraph that contains the path. It will highlight the entire paragraph.

```
{IF {MERGEFIELD Document }<> "" "{INCLUDETEXT "Macintosh  
HD:Campagne:Word Merge-{MERGEFIELD Document}" } }
```

- 2 Position your cursor just before the "{" in the "Includetext" and double click. This should automatically highlight the pathname.

```
{IF {MERGEFIELD Document }<> "" "{INCLUDETEXT "Macintosh  
HD:Campagne:Word Merge-{MERGEFIELD Document}" } }
```

- 3 Press **Delete**.

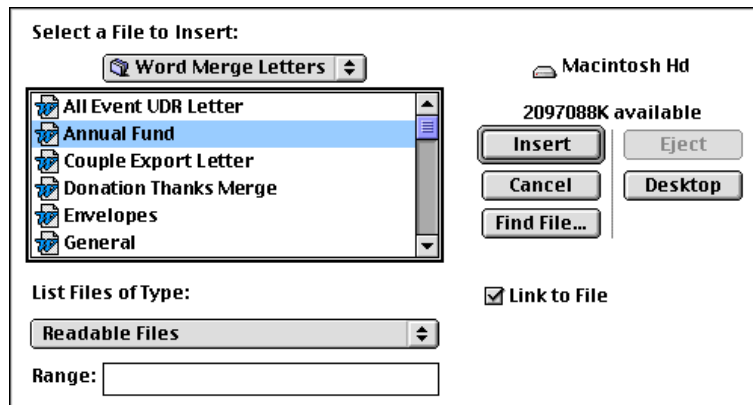
```
{ IF { MERGEFIELD Document } <> " " }
```

- 4 Select **Insert > File**.



- 5 Click the **Link to File** box in the Select a File to Insert window. In Word 2000 select **Insert** at the bottom of the window and select **As link**.

- 6 Highlight one of the thank you Letters in the WordMerg folder and click **Insert**.



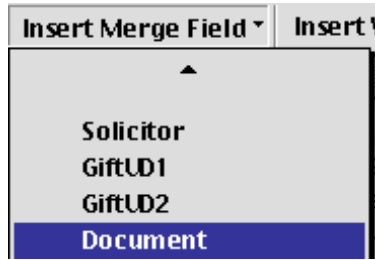
Word inserts the new pathname as shown below.

```
{ IF { MERGEFIELD Document } <> " " { INCLUDETEXT "Mary's Hard Drive: Campaign: Word Merge Letters:Annual Fund" } }
```

- 7 Highlight only the name of the document you selected in step #6.

```
{ IF { MERGEFIELD Document } <> " " { INCLUDETEXT "Mary's Hard Drive: Campaign: Word Merge Letters:Annual Fund" } }
```

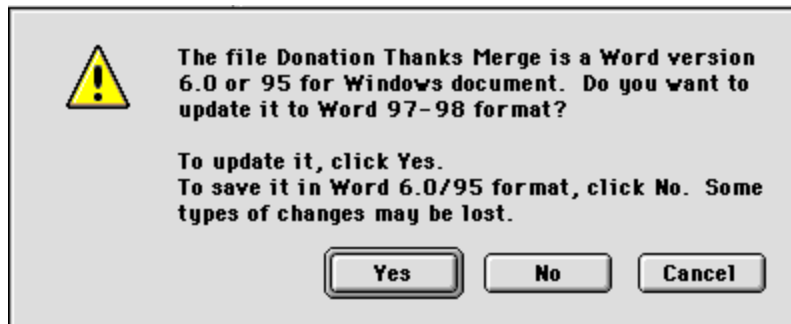
- 8 Select **Insert Merge Field > Document** (document appears roughly half-way down the list, after the GiftUD1 and GiftUD2).



Word overwrites the name of your thank you Letter Body document with MERGEFIELD Document.

```
{ IF { MERGEFIELD Document } <> "" { INCLUDETEXT "Mary's Hard Drive: Campaign: Word Merge Letters:{ MERGEFIELD Document }" } }
```

- 9 Change the **closing salutation** of the shell letter to read your name and title.
- 10 You may wish to further modify the letter with the merge fields turned on by adding extra carriage returns after the date field at the beginning or end of the letter, change the font to match the font of your thank you Letter bodies, etc.
- 11 When you have finished editing, save the shell document in the WordMerg folder. If you get the following message, click **Yes** to update the document to your version.



V. Enter Donations

In order for you to use the mail merge process to produce thank you letters, you must remember to complete the following two steps for each gift you process. In the Gift Entry window's Thank You Letter section:

- 1 Make sure that the **Send?** box is checked.
- 2 Specify a thank you letter body for that particular gift using **Lookup** in the **Document** field. You can use a different thanks letter for each gift.

When you are done entering gifts, you should run the Donations Received Report to check the accuracy and completeness of each new donation entered (see the reference manual for details on the Donations Received Report).

VI. Create a Donation Thank You Export File

Follow these steps to create an export file for the gifts you just entered:

- 1 Click the **Donation Thank Yous** button in GiftMaker Pro's Main Menu.
- 2 In the Donation Thank Yous window, select **Export File** under Output Formats.
- 3 Click the **Export Parameters** button to open the Export File Parameters dialog box.
- 4 Leave the **Export File Name** as **DTYData.DOC** and select the following options:
 - File Format equals **Tab Delimited**
 - Date Format should be the long form (e.g. **April 1, 2000**)
 - **Export complete name and address**
 - **Export code fields as Description**
- 5 Click **OK/Enter**.
- 6 Click **Process/Enter** in the Donation Thank Yous window to export the file, named **DTYData**. The export file is placed in the same folder as your GiftMaker Pro application (usually found in the Campaign folder).

***NOTE:** If you want labels or envelopes printed, you would select these as output options in addition to the export file.*

VII. Perform Mail Merge in Word

To merge the export file gift data with your thank you letters, follow these steps:

- 1 Open the **Dtymerge** shell document created in Procedure IV. The typical path to the thank you shell letter is **C: / Campaign/ WordMerg/ Dtymerge**.
- 2 If you see a dialog box with a message stating that the document "... is a mail merge main document. Word cannot find its data source...", then take these steps:
 - a. Click on the **Find Data Source** button to open the **Open Data Source** window

- b. Locate the Donation Thank You export file located in the GiftMaker Pro folder and double-click it to open it. The path to this file is typically **C: / Campagne/ GiftMaker Pro/ DTYData**.

- 3** Select **Tools > Mail Merge**.
- 4** Click on the **Merge** button.
- 5** To merge all of your letters, click **Merge** again.
- 6** You will be prompted to **enter a date**. Type in the date you want to appear on your letters. (e.g. January 1, 2000), then click **OK**.
- 7** Your letters should now appear in Word as a new, unnamed document. The letters will be separated by page breaks. At this point you should scan through your letters to ensure they appear correct. You can make adjustments as needed in these letters, and then print them.

***NOTE:** If there are any changes that need to be made to the fonts, margins, or text, you should close the merged document without saving, make the changes in the shell letter or the thank you letter bodies, and then perform the merge again.*

***NOTE:** Word 2000 letters do not display. They are on the task bar. Double click to open merged letters.*

VIII. Clear Donation Thank Yous

When you have finished printing your donation thank yous, you must remember to clear the donation thank you codes to keep them from appearing in your next batch of thank yous. Clearing the codes prepares GiftMaker Pro to accept a new batch of donations and generate new data for another set of thank you letters.

- 1** Select Donation Thank Yous from GiftMaker Pro's Main menu.
- 2** Click **Clear Send Thank You Code**. This clears all records currently marked to receive donation thank yous and posts the date that appears below this box as the Thanked Date on each record.

Pledge Thank Yous

You can customize pledge thank you letter bodies and a pledge shell letter for GiftMaker Pro just as you did your thank you letter bodies and shell (procedures I – IV). You can also process pledge thank you letters (procedures V - VIII) in much the same way as donation thank yous. Just remember to use the Pledge Thank Yous button in the Main Menu (instead of the Donation Thank Yous button) when you are ready to clear your pledge thank yous or generate your export file. Note that the export file in the pledge thank you process is named **PTYData** rather than **DTYData**, and that you should use the shell letter **Ptymerge** instead of **Dtymerge**.